Travel Montana

Image and Positioning Assessment
Final

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Table of Contents

Executive Summary

The mission of Travel Montana is to strengthen Montana's economy by promoting the state as a vacation destination. As such, Travel Montana must educate potential travelers about state attractions and convince them to visit. In this light, Travel Montana must understand how potential visitors view the state and how to position it in the most appealing way. This research explores the types of activities that people enjoy on their trips; identifies potential visitor segments based on their activity preferences; evaluates respondents' knowledge and interest in various states; and provides information relative to Montana improving its image and increasing visitation.

One of the first research goals was to explore what people do when they travel, and to identify groups of activities that are important in selecting a destination. Respondents were asked to indicate the activities that they regularly include on their trips. These activities were then grouped into four categories based on how they were viewed by respondents. This process provided insight into how people choose destinations.

Generally, when selecting destinations, respondents choose between man-made (developed) or natural attractions. For example, some people enjoy the excitement of cities, while others prefer the beauty of mountains. In addition, they choose between things they can do – activities, and things that are more experiential in nature. These two dimensions of the selection process create four groups of activities: developed activities, developed experiences, natural activities, and natural experiences. The following depicts how each attribute was classified and lists the percentage of respondents that included it in their trips - at least most of the time.

Developed Activities	**% All & Most**
Shopping	50.8
Family activities and attractions	42.9
Museums and cultural	35.2
Urban culture/city attractions	32.1
Festivals or fairs	16.4
Golf	12.7

Developed Experiences	**% All & Most**
Historic sites or landmarks	46.9
Native American culture	18.3
Gambling	13.9

Natural Activities	% All & Most
Dramatic landscapes/Mountains	44.6
Lakes, rivers, water	41.7
State or National parks	34.4
Wildlife viewing	28.8
Camping	18.0
Hiking or backpacking	15.4
Snow skiing	11.8
Hunting or fishing	11.7
Snowmobiling	4.2

Natural Experiences	% All & Most
Quaint small towns	32.7
Vast unspoiled landscape	31.8
Cowboy or Western experiences	8.1

In a like manner, respondents used these same types of considerations to evaluate states. The following shows how respondents classified each state.

Natural Activity states – includes Colorado, Western Canada, Oregon, Utah, and Idaho. Each destination has a strong image in at least one or two of the participatory sports such as skiing or snowmobiling. People feel they can participate in the rugged outdoors in these states.

Developed Activity states – this category includes California and Washington. These two states have the most urban, sophisticated, and yet active images.

Developed Experience states – Arizona, New Mexico, and South Dakota - are linked most closely to the Native American culture. This attribute helps to differentiate these states.

Natural Experience states – includes Wyoming and Montana. These states have an outdoor image, but it is more significantly linked to a Western experience and beautiful scenery rather than participatory sports.

In addition to how potential visitors view the states, it is also important to consider their past behavior. Respondents reported the highest levels of visitation to California, Arizona, and Colorado overall and during the last five years. Currently, Montana records a comparatively low level of visitation, with approximately 10% of respondents indicating a visit to the state in the last five years.

	Visited (ever)	Visited (5 Years)
California	73.6%	52.9%
Arizona	55.5%	39.4%
Colorado	51.6%	32.3%
New Mexico	44.5%	28.5%
Washington	37.3%	21.6%
Utah	35.1%	19.1%
Oregon	29.8%	16.3%
Western Canada	28.3%	15.5%
Wyoming	26.8%	11.9%
Idaho	21.8%	10.5%
Montana	20.9%	9.8%
South Dakota	20.9%	7.9%

Interesting findings surfaced when respondents were asked their likelihood to consider these states as future destinations. The responses suggest that future behavior may differ from that of the past. The states that inspired the greatest future interest were Colorado, Washington, and Arizona. Almost a quarter of the respondents indicated being very likely to consider Montana for their next trip.

	Likely Visit	Index
Colorado	39.3%	142
Washington	36.5%	132
Arizona	35.5%	129
New Mexico	31.1%	113
Oregon	30.0%	109
Western Canada	29.0%	105
California	27.6%	100
Utah	26.0%	94
Wyoming	24.6%	89
Montana	23.8%	86
Idaho	14.4%	52
South Dakota	13.3%	48

Activity preferences can also help define meaningful customer segments. Since people tend to look for specific types of trips, this can be an effective way to target people and develop meaningful advertising messages. The research identified six traveler segments, which are defined as follows:

Active Empty Nesters – 26.6% - This group includes married couples whose kids have left the nest. In addition to being empty nesters, they tend to be active. Though they like a mix of urban and natural activities, they prefer to **do** rather than look.

Active Families – 24.9% - This group is similar to the first, although they are younger and usually have children living at home. Consequently, this group tends to focus on family-related activities, but they also like beautiful scenery and participating in activities like camping, hiking, and skiing.

Sightseers – 15.5% - This is an older, empty nester group. They differ from Active Empty Nesters in their preferences. This group prefers to **look** at things – historic sites, museums, parks, and beautiful scenery.

Natural Families – 13.3% - this segment is comprised of families with children and they like family-focused activities. In addition, they like natural features and activities that are somewhat passive or experiential. They want to enjoy the great outdoors and are not particularly interested in cramming as many activities as they can into the trip.

Urban Cowboys – 12.9% - This sophisticated group prefers active pursuits and the Cowboy or Western experience. They like luxury and are not known to *rough it*. Nevertheless, they want to get back to nature – at least *controlled* nature.

Economy Seekers – 6.9% - The final group is defined by their focus on economy. This group earns the lowest incomes and is less well educated. They look for inexpensive lodgings and they like to camp. They enjoy a variety of activities including parks, gambling, and museums.

Conclusions & Recommendations

The following specific conclusions and recommendations are based on this research:

- Montana faces a challenging competitive situation and to successfully compete, the state needs a well thought out and executed strategy. While there was some awareness of the state in the four markets under consideration, a compelling and unique image has yet to be created. Past levels of visitation are low and future interest remains low as compared to that of many competitors.

- When selecting a travel destination, people look for specific types of trips and then choose the destination they believe will deliver what they are looking for. Generally, people choose between places where they can do things (activities) or experience things. Additionally they differentiate between natural or God-made attractions and developed or man-made attractions.

- While it is relatively easy to determine if something is natural or man-made, the difference between activities and experiences is not as clear. This is especially true regarding the Western or Native American culture**,** which is a key feature of Montana and its competitors. This research leaves questions as to how respondents view Western and Native American experiences. This issue should probably be explored further.

- Currently, Montana is viewed as a more *Natural Experience*. Montana offers lots of rugged, outdoor activities and it is not considered as strong in this area as states like Colorado and Oregon. At the same time, both Montana and Wyoming have the image of the quintessential Western destination.

- At this point, Montana is viewed as most similar to Wyoming. Currently, Montana has recognized this synergy and works with Wyoming as a natural ally. This strategy should continue to work to attract the state's *traditional* audience. To broaden its audience and attract additional visitors, Montana may want to differentiate itself. A review of Montana's current image and that of its competition suggests that the state should market its *more developed attractions* such as golf, urban attractions, festivals, and museums. The key will be identifying the areas that Montana can promote where the product supports the marketing message. Generally, Montana needs to continue to promote itself as a place that offers outdoor activities, but one that has a strong Western culture and a bit of sophistication as well.

- Of course, the final message also depends on the people the state targets as potential visitors. The best option for Montana seems to be Active Empty Nesters, which is the largest group and the one that shows interest in Montana. The key activities for this group include golf, museums, small towns, and historic sites. Active Families and Urban Cowboys might also be worth targeting. With all three groups, an activities message will be most appealing.

- Targeting a slightly different message to each group is the best option. For example, both Active Empty Nesters and Urban Cowboys will react positively to golf promotions, but the spin on the message should be slightly different. With Active Empty Nesters, golf should be packaged with some culture and history, while for Urban Cowboys, the message should focus on luxury and the availability of other active outdoor opportunities. With Active Families, the message should include strong doses of family activities and the message that there is lots to do in Montana.

- At the same time, Montana should maintain its image as a place with strong Western culture. The marketing should probably focus on new and unexpected activities, while showing expected images and scenery. The state should try to convince people that there is more than empty space, since this sends the message that there is little to do or enjoy in the state.

- Whatever message is chosen, it is possible to promote this message in all four geographic areas under consideration. The differences in attitudes between the markets were *insignificant*. The closer markets may visit sooner but the eastern markets promise strong potential for Montana.

Background & Objectives

Given its mission, Travel Montana strives to educate potential travelers about state attractions and convince them to visit the state. Montana offers a wonderful travel product, which includes the scenic beauty of Glacier National Park and the history of the Lewis and Clark Trail. Nevertheless, visitation depends upon consumer awareness of these features. In this light, Travel Montana must understand how potential visitors view the state and how to position it in the most appealing way.

In addition to effective marketing efforts, the state has used research to track effectiveness and refine advertising decisions. Now Travel Montana is interested in exploring consumer attitudes by assessing the state's image in four key markets. The goal is to gain a clearer understanding of how consumers view Montana as a travel destination and to identify options for positioning the state as an attractive place to visit. Specific informational objectives for this study include:

- Measure mind share for Montana versus competitive states as a leisure destination in the Dallas, Los Angeles, Boston, and Miami markets
- Determine interest in visiting Montana versus competitive states as a leisure destination
- Identify key criteria in the destination selection process and identify what motivates people to visit Montana and its competition
- Compare current attitudes and perceptions surrounding Montana to those of the state's primary competitors
- Develop a positioning profile for Montana and its primary competitors in the context of selection criteria evaluations
- Explore enhancements to the state's image and positioning that could prompt increased visitation
- Consider all of the above in light of key classificatory data including demographics, geographics, customer segments, travel and vacation attitudes and values, including comparisons between visitors and non-visitors
- Provide specific conclusions and recommendations to stimulate further discussion and consideration of the results.

Methodology

This research explores the image that potential visitors have of Montana and its key competitors. In addition to exploring existing attitudes, the survey also identifies ways to position the state so that it can effectively compete and attract additional visitation. These objectives were met via a telephone survey conducted among a random sample of travelers from four markets.

The survey was conducted among 800 households - 200 in each of these markets: Boston, Los Angeles, Dallas, and Broward/Palm Beach Counties. These four markets were identified based on an analysis of advertising leads to represent different regions of the country. Households were screened to ensure that they had taken at least one leisure trip or vacation in the last year. All interviewing was conducted from SMRI’s telephone center, using trained staff and computer-aided techniques.

The questionnaire explored numerous issues including past visitation to key states, images of each state, preferred travel activities, and attitudes toward Montana and its competitors as vacation destinations. To identify Montana’s key competitors, an initial survey was conducted. This survey was conducted among people who had requested information from Montana in the recent past. Among this group, people were asked to identify the destinations that they were considering for travel. These destinations were then used as a competitive list for evaluation. (A copy of these findings is included in the Appendix.) The final questionnaire was then designed to allow the use of a statistical procedure called perceptual mapping. (A copy of the questionnaire is included in the Appendix).

At the conclusion of the data collection effort, the data strings were cleaned and coded for analysis purposes. A number of statistical procedures were used, including cluster, and discriminant analysis. In addition, perceptual mapping was used to assess the findings and present the results. The following is a summary of the key findings, including image profiles of each competitive state and the traveler segments identified. The summary also includes conclusions and recommendations based upon the research findings.

Trip Activities

This study explores Montana's image among potential visitors and identifies ways to improve the state's image. First, however, we visit the issue of potential visitors. The most successful marketing programs aim the appropriate message to the appropriate targets based on their needs and their current image of Montana.

What types of activities are most important to visitors when they vacation? We reviewed past behavior and investigated what people typically do when they travel by presenting respondents with 21 activities. They were then asked to indicate how often their trips included these activities. The response options were *all*, *most*, *some,* or *none*.

Most of the activities listed are those found appealing to particular segments of the population. Only one activity, shopping, was routinely included during vacations by over half the people surveyed. Over 40% routinely include four other activities during their trips – historic sites/landmarks, dramatic landscapes/mountains, family activities/attractions, and lakes, rivers, and water-related activities. These key activities are routinely an integral part of travelers' trips.

	% All	% Most	% Total
Shopping	32.4%	18.4%	50.8%
Historic sites or landmarks	18.9%	28.0%	46.9%
Dramatic landscapes and mountains	19.4%	25.2%	44.6%
Family activities and attractions	22.1%	20.8%	42.9%
Lakes, rivers, water	17.0%	24.7%	41.7%
Museums and cultural	15.9%	19.3%	35.2%
State or National parks	15.1%	19.3%	34.4%
Quaint small towns	11.9%	20.7%	32.7%
Urban culture/city attractions	12.2%	19.9%	32.1%
Vast unspoiled landscape	13.6%	18.2%	31.8%
Wildlife viewing	13.7%	15.1%	28.8%
Native American Culture	7.4%	10.9%	18.3%
Camping	8.5%	9.5%	18.0%
Festivals or fairs	6.0%	10.4%	16.4%
Hiking or backpacking	6.2%	9.1%	15.4%
Gambling	6.6%	7.2%	13.9%
Golf	5.8%	6.9%	12.7%
Snow skiing	4.6%	7.2%	11.8%
Hunting or fishing	4.8%	6.9%	11.7%
Cowboy or Western experiences	3.3%	4.8%	8.1%
Snowmobiling	1.7%	2.5%	4.2%

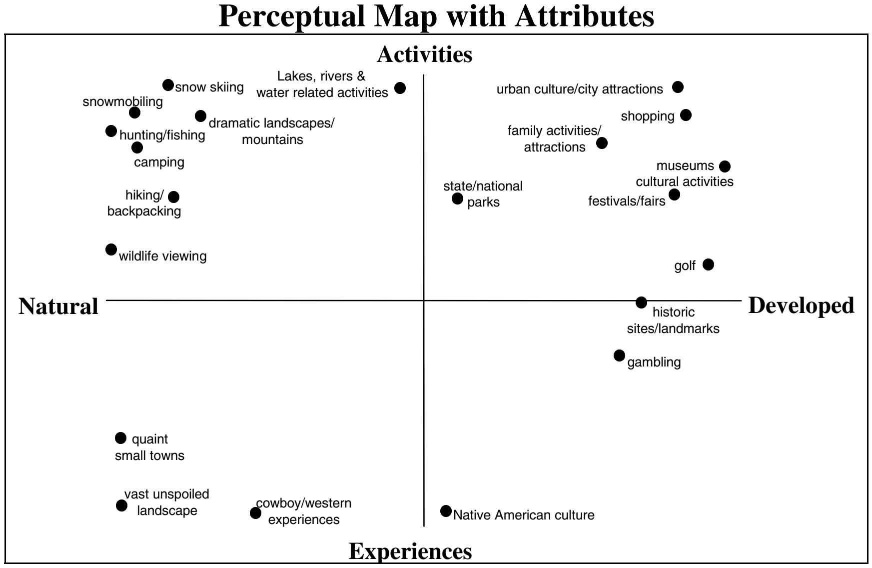
Of these activities, fewer than 20% of respondents reported including ten of them on their trips with any frequency. Some of the least popular included snowmobiling, Cowboy or Western experiences, hunting and fishing, and snow skiing. While still important, these activities merely appeal to a much smaller segment of the population. It also should be noted that the activities most prevalent among travelers do not necessarily influence the travel decision. While most people shop when they travel, this activity is available in most places. Hence, people do not necessarily pick a destination solely for the shopping experience. We are interested in activities that motivate the travel decision and how these activities vary by consumer segment.

When considering different destinations, rather than focusing on a single activity or attribute, people often look for a package of activities based on their travel preferences. In other words, people look for a specific kind of "experience" when they travel. By choosing certain types of activities, they might expect to find similar activities in the area. Montana can benefit by knowing how visitors see the competitive landscape and what they look for in a destination.

Perceptual mapping is a tool that allows one to see how consumers evaluate different destinations and the inter-relationship of those to various activities. This statistical technique considers an individual's pattern of ratings. These patterns can be used to map the attributes and the various destinations and identify underlying dimensions of the decision process. Perceptual mapping provides a global view of all this information.

We first consider how this process "maps" the various attributes under consideration. The relative position of each attribute depicts the competitive landscape and people's perceptions of potential travel experiences.

Perceptual Map with Attributes



This map shows the inter-relationship of the various activities and highlights the fact that there appear to be two underlying dimensions in the assessment process. On the *horizontal* axis, activities range from *natural on the left* to *man-made or developed on the right*. On the *vertical* axis, travel experiences that tend to be activities rise to the top, while those that are more experiences are pulled to the bottom of the map. Activities toward the top of the map represent *doing or active pursuits,* while activities at the bottom of the map are more *non-participatory* in nature and involve looking at things.

On the map, these twenty-one activities can be split into four groups. A discussion of each group provides insight about how potential visitors perceive certain destinations. It also shows which activity groups are most popular among visitors.

The most popular activity group includes dynamic, developed features, which include man-made attractions and activities. In total, 52.7% of respondents included at least one of these activities on most of their trips. This group includes the most popular activity, shopping and other activities that are likely to be found in urban areas. In addition, family activities are included in this category. Past research conducted by SMRI reveals that when people travel with children they prefer known attractions. To avoid a bad vacation experience with kids, people are less likely to be adventurous.

Other activities in this factor are festivals/fairs and golf. The reason that these activities are grouped with the more urban activities is partly due to the other activities included in this list. There was emphasis on the outdoors, scenery, landscapes, and active sports activities. In this context, golf and festivals are considered more "developed" activities. In another study conducted by SMRI, more "developed" activities were included (such as theme parks, symphony performances, etc.) and golf and festivals were considered more natural and less activity-oriented. As such, the context for evaluation rests with the states being evaluated.

The following table shows each activity in the factor and the percentage of people that claimed to include this activity in most of their trips. A Factor Total indicates what percentage included at least one activity in all their trips.

Developed Activities	**% All & Most**
Shopping	50.8
Family activities and attractions	42.9
Museums and cultural	35.2
Urban culture/city attractions	32.1
Festivals or fairs	16.4
Golf	12.7

The second most popular activity group is the Natural Activities group, with slightly less than 40% reporting participation in one activity. The most popular activity in this group is enjoying dramatic landscapes/mountains and lakes, rivers, and water-related activities. Only a few people reported camping, snow skiing, hunting, fishing, or snowmobiling. Generally, any activity that attracts people to the great outdoors and involves participation is included in this factor.

Natural Activities	**% All & Most**
Dramatic landscapes/Mountains	44.6
Lakes, rivers, water	41.7
State or National parks	34.4
Wildlife viewing	28.8
Camping	18.0
Hiking or backpacking	15.4
Snow skiing	11.8
Hunting or fishing	11.7
Snowmobiling	4.2

“Experiences” were less popular among respondents. With the developed experience factor, approximately one-quarter claimed to routinely include these activities in their trips. The most characteristic activity in this factor is historic sites and landmarks. People generally consider historic sites much less active – things to see rather than do. The other two activities are Native American culture and gambling. It may be that Native American culture is included in this factor because gaming is often a part of Native American enterprise in this region. While respondents were asked to indicate how often they included Native American culture in their trips, the survey did not explore what this specifically meant. The percentage of people that included Native American culture in their trips seems high, but without knowing the specific activities, it is difficult to assess why this is so. This issue should probably be explored in greater depth.

Developed Experiences	**% All & Most**
Historic sites or landmarks	46.9
Native American culture	18.3
Gambling	13.9

The final factor includes natural experiences. As might be expected, vast, unspoiled landscapes are part of this factor. The other two attributes do not so obviously fall into this factor. Quaint small towns and Cowboy/Western experiences are probably included here because of the other features being considered. Small towns are considered more natural as compared to urban areas. The Cowboy or Western experiences are probably related to small towns in the west, which define this culture. They are considered less active when contrasted to hiking, skiing, and snowmobiling. In addition, as with Native American culture, it is not clear what respondents meant when they talked about Cowboy and Western experiences.

Natural Experiences	**% All & Most**
Quaint small towns	32.7
Vast unspoiled landscape	31.8
Cowboy or Western experiences	8.1

Traveler Segments

Marketing states and destinations is difficult because travelers do not comprise a homogeneous group. As the preceding information highlighted, different people prefer to have different experiences when they travel. A message considered exciting and interesting to one person may be irrelevant to another. As such, the differences between traveler segments are significant and meaningful to targeting decisions.

Past research conducted by Montana (the focus group research) revealed that people tend to first choose activities and then a place that offers those activities. SMRI's research supports this finding. Consequently, knowing what people do on vacation allows us to create traveler segments. A statistical procedure called cluster analysis was used to identify people with similar travel preferences. Through this process, six groups were identified. Differences are noted among each group relative to activity preferences and demographics. These six segments are explored in detail. An overview first highlights the differences between the groups and the relative size of each.

Active Empty Nesters – 26.6% - This group includes married couples whose kids have left the nest. In addition to being empty nesters, they tend to be active. Though they like a mix of urban and natural activities, they prefer to **do** rather than look.

Active Families – 24.9% - This group is similar to the first, although they are younger and usually have children living at home. Consequently, this group tends to focus on family-related activities, but they also like beautiful scenery and participating in activities like camping, hiking, and skiing.

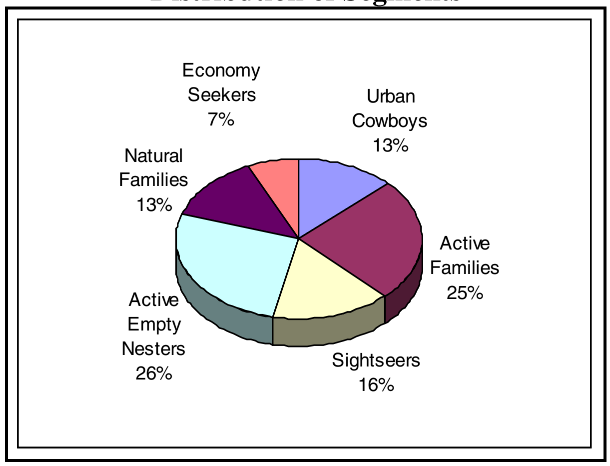
Sightseers – 15.5% - This is an older, empty nester group. They differ from Active Empty Nesters in their preferences. This group prefers to **look** at things – historic sites, museums, parks, and beautiful scenery.

Natural Families – 13.3% - this segment is comprised of families with children and they like family-focused activities. In addition, they like natural features and activities that are somewhat less activity-oriented. They want to enjoy the great outdoors and are not particularly interested in cramming as many activities as they can into the trip.

Urban Cowboys – 12.9% - This sophisticated group prefers active pursuits and the Cowboy or Western experience. They like luxury and are not known to *rough it*. Nevertheless, they want to get back to nature – at least *controlled* nature.

Economy Seekers – 6.9% - The final group is defined by their focus on economy. This group earns the lowest incomes and is less well educated. They look for inexpensive lodgings and they like to camp. They enjoy a variety of activities including parks, gambling, and museums.

Distribution of Segments



While the segments vary in size, the largest is only about a quarter of the population. This means that Montana will probably want to target more than one segment. A review of the preferences and attitudes that each has toward Montana will help in the selection process.

Before reviewing individual segments, it is helpful to consider the respondent profile and to discuss how the individual segment information will be presented. The demographic profile of this group is quite interesting. It is important to recall that respondents came from four large metropolitan areas – Dallas, Los Angeles, Boston, and the Broward/Palm Beach Counties of Florida. Therefore, while the income and education levels for the group may seem high, this is in part a result of the geographic areas being considered. In addition, respondents were screened to ensure that they were leisure travelers, and leisure travelers tend to have more discretionary income.

The following are definitions for each demographic statistic presented:

- Married – the percent of respondents that indicated being married
- College Degree – the percent of respondents that indicated having a college or post graduate degree
- Income – the average reported income level
- Household – the average number of people living in the household
- Kids – the average number of children under 18 years of age in the household
- No Kids in Family – the percent of households that reported having no children under the age of 18 living in their household
- Age – the average age of the survey respondent

Having reviewed the demographic profile of the entire respondent base, we compare this overall profile to the profile for each segment. The easiest way to make this comparison as well as other comparisons is by use of an "index." An index compares the responses of a segment to the whole. With an index, a score of 100 means that the responses of the segment are the same as that of the whole. A score higher than 100 indicates that this attribute or behavior is more prevalent within the segment, while an index of less than 100 means that the behavior is less prevalent. For example, 52% of the overall sample has a college degree, and 46% of the Active Empty Nesters have a college degree.

The index is calculated as follows: (46%/52%)*100 = 88.

These indexes will be used throughout the following evaluation of the individual traveler segments, as an easy way to determine whether the behavior of the segment is above or below average.

Active Empty Nesters

The largest group of travelers is the Active Empty Nesters. They are generally married couples and some are older singles. By comparison to the other groups, these folks are less well educated and their incomes are average. Because they are older, they are less likely to have children living at home.

	Actual	Index
Married	60.6%	97
College degree	46%	88
Income	$83,000	99
Household	2.6	100
Kids	0.7	100
No kids in family	64%	107
Age	50 yrs	102

This group prefers variety in their activities. Though a bit older, they are active. They enjoy historic sites and landmarks, museums and urban culture. They also enjoy hiking, hunting, and skiing. This group is partial to Native American culture and Cowboy and Western experiences.

Active Empty Nesters	%	Index
Historic sites or landmarks	50.5	108
Dramatic landscapes/mountains	44.7	100
Family activities and attractions	44.2	103
Museums and cultural	35.4	101
Urban culture/city attractions	34.5	107
Quaint small towns	34.0	104
Festivals or fairs	20.9	127
Native American culture	19.4	106
Hiking or backpacking	18.0	117
Camping	18.0	100
Gambling	17.0	122
Golf	16.5	130
Hunting or fishing	13.1	112
Snow skiing	13.1	111
Cowboy or Western experiences	9.2	114

This group is characterized by its love of both natural and developed activities. People in this group enjoy visiting new places, confirming their spirit of adventure.

Active Families

The second largest traveler segment is Active Families. In many ways, this group is similar to Active Empty Nesters, though they are younger and more likely to have children at home. This group also includes young couples and singles. Though younger, over half have a college degree and the average household income is above average.

	Actual	Index
Married	60.8%	97
College degree	56%	108
Income	$89,600	107
Household	2.8	108
Kids	0.9	129
No kids in family	50%	83
Age	45 yrs.	92

Family activities lead the way with this group, followed by lakes, rivers, and water activities. While these folks generally prefer the great outdoors, they also enjoy urban attractions. They prefer to do rather than look.

Active Families	%	Index
Family activities and attractions	47.0	110
Lakes, rivers, water	46.0	110
Dramatic landscapes/Mountains	44.9	101
Urban culture/city attractions	33.3	104
Camping	19.2	107
Hiking or backpacking	16.7	108
Snow skiing	13.1	111

While features like amusement parks were not considered, these folks probably enjoy them. Montana will have to compete with a wide range of destinations; many not included in this survey, to attract Active Families.

Sightseers

Sightseers comprise 15.5% of travelers and are the third largest segment. This group is the oldest segment, with an average age of 55. They are the least likely to have children at home. Sightseers are generally married and although half have a college degree, this number is slightly below average, as is their income level. These Empty Nesters enjoy less active pursuits, and prefer experiences.

	Actual	Index
Married	68.5%	110
College degree	51%	98
Income	$82,600	98
Household	2.3	88
Kids	0.5	71
No kids in family	72.3%	121
Age	55 yrs.	112

Sightseers prefer "experiences" rather than activities. They enjoy some of the same things enjoyed by the other groups, but when they enjoy dramatic landscapes or national parks they are looking not doing. They enjoy seeing natural sites and historic and urban attractions at new and familiar destinations.

Sightseers	%	Index
Historic sites or landscapes	51.6	110
Dramatic landscapes/Mountains	47.5	107
Museums and cultural	42.6	121
Vast unspoiled landscape	36.1	114
State or National parks	35.2	102
Urban culture/city attractions	32.0	100
Wildlife viewing	32.0	111
Native American culture	22.1	121

This group will get off the beaten trail and see what they can find along the way. They enjoy all kinds of activities and like experiencing the local culture as much as unique features and attractions.

Natural Families

The fourth largest segment, comprising 13.3% of the population, is Natural Families. This segment is usually married and although somewhat older, they tend to have children living at home. People in this group are slightly less well educated and earn lower incomes than some others segments included in this research. Nonetheless, their average household incomes are quite high, compared to a national average.

	Actual	Index
Married	63.2%	101
College degree	47%	90
Income	$78,300	93
Household	2.6	100
Kids	0.9	129
No kids in family	49.4%	82
Age	51 yrs.	104

Natural Families enjoy many activities when they travel, but the focus is on natural sites and activities. Family activities and attractions are favored and they are apt to visit state and national parks. This group is the most likely to camp and, as such, they tend to like inexpensive accommodations. In addition to camping, Natural Families enjoy hunting, fishing, snowmobiling, and skiing.

Natural Families	%	Index
Shopping	53.8	106
Family activities and attractions	51.0	119
State or National parks	41.3	120
Museums and cultural	36.5	104
Vast unspoiled landscape	35.6	112
Quaint small towns	34.6	106
Wildlife viewing	31.7	110
Camping	24.0	133
Native American culture	22.1	121
Festivals or fairs	21.2	129
Hunting or fishing	17.3	148
Snow skiing	12.5	106
Snowmobiling	11.5	274

This group will be less likely to visit cities or amusement parks. Instead, Natural Families will look for small towns and rural areas. They like to get away from it all and spend time with family. Family activities are important to these travelers and they want to escape from civilization when they travel.

Urban Cowboys

The interesting thing about Urban Cowboys is the manner in which they differ from the other groups. They comprise 12.9% of the total and they are the youngest, best educated, and most up-scale group. Urban Cowboys tend to be married couples with children. Though sophisticated in their preferences, this group enjoys the great outdoors.

	Actual	Index
Married	66%	106
College degree	63%	121
Income	$96,800	115
Household	2.7	104
Kids	0.8	114
No kids in family	59.3%	99
Age	45 yrs.	92

Urban Cowboys earn their name via a combined love of luxury and urban activities with an appreciation for outdoor sites and activities. This group chooses luxury accommodations and they like sophisticated attractions such as gambling, museums, and urban culture. At the same time, they enjoy golf, hiking, skiing, and snowmobiling. The key to understanding Urban Cowboys is to remember that they will probably not want to rough it while vacationing. They are more apt to choose resorts or more developed options for *getting back to nature*.

Urban Cowboys	%	Index
Shopping	55.9	110
Lakes, rivers, water	49.0	118
Museums and cultural	37.3	106
Vast unspoiled landscape	36.3	114
Urban culture/city attractions	36.2	113
Gambling	17.6	127
Golf	17.6	139
Hiking or backpacking	16.7	108
Snow skiing	12.7	108
Cowboy or Western experiences	12.7	157
Snowmobiling	5.9	140

This group might best be characterized as the young, hard-chargers. They are successful in business, have a lot of money, and crave the outdoors. They often live in urban areas for business reasons, but like to get away and enjoy the great outdoors. At the same time, this group's idea of relaxation is to throw themselves into sports. They enjoy "active relaxation."

Economy Seekers

People in this group earn the lowest household incomes and are the least well educated. As such, they look for economy accommodations when they travel. While this group includes many married couples, it also has the highest percentage of widowed and divorced families. There are fewer children living at home and, as a whole, Economy Seekers are a bit older.

	Actual	Index
Married	54.5%	87
College degree	42%	81
Income	$67,300	80
Household	2.5	96
Kids	0.5	71
No kids in family	74.4%	124
Age	52 yrs.	106

Economy Seekers prefer to have a variety of things to do and like small towns and rural areas when they vacation. They also like a mix of new and familiar destinations. In addition to camping at state and national parks, they like gambling, wildlife viewing, hunting, and fishing.

Economy Seekers	%	Index
Museums and cultural	41.8	119
State or National parks	41.8	122
Quaint small towns	34.5	106
Wildlife viewing	29.1	101
Camping	25.5	142
Native American culture	23.6	129
Gambling	18.2	131
Hiking or backpacking	16.4	106
Hunting or fishing	14.5	124

The desire for economy drives this segment’s travel decisions. They are less likely to choose cities and more likely to select rural areas or small towns. They tend to enjoy relaxed activities.

Evaluating the States

This research attempted to determine Montana's current image among potential visitors and to place this imagery in the competitive landscape. Here, the various states can be assessed on many levels. Before considering state imagery, we review familiarity, past visitation, and the ratings earned by each state.

A good place to start is to consider respondents' familiarity with the states as leisure trip or vacation destinations. Respondents were asked how familiar they were with each state and what it has to offer as a leisure travel destination. The following shows the percentage of respondents that indicated they were either "very" or "somewhat" familiar with the state. Familiarity levels varied significantly, as almost everyone was familiar with California and about half were familiar with Idaho and South Dakota. Montana certainly did not earn the highest level of familiarity, though respondents were relatively knowledgeable about the state.

	Familiarity	Index
California	94.2%	142
Colorado	83.1%	125
Arizona	78.3%	118
Washington	73.9%	111
New Mexico	68.6%	103
Utah	63.7%	96
Western Canada	63.0%	95
Wyoming	59.2%	89
Oregon	58.8%	89
Montana	57.1%	86
South Dakota	52.0%	78
Idaho	45.1%	68

Visitation is another key issue. While past behavior is not necessarily a predictor of future behavior, it does suggest the popularity of certain states. Both general past visitation and visitation in the past five years were explored. The following table shows the percent that visited any time in the past and the percent that visited in the past five years.

Visitors report the highest levels of visitation to California, Arizona, and Colorado overall and in the last five years. New Mexico seems to be gaining in popularity, as the percentage of travel in the past five years is quite high. Currently, Montana records a comparatively low level of visitation, with approximately 10% of respondents indicating a visit to the state in the last five years.

Note that the markets included in the survey are somewhat influenced by levels of past visitation to these sites. For example, 70% of the Dallas respondents had been to New Mexico, which is one reason why the state has higher past visitation, and the Dallas market also pushes up visitation numbers for Colorado. Of course, this reflects the actual competitive environment Montana faces, but it may help to explain these findings. Visitation by market will be explored later in the report to identify these trends.

	Visited (ever)	**Visited (5 Years)**
California	73.6%	52.9%
Arizona	55.5%	39.4%
Colorado	51.6%	32.3%
New Mexico	44.5%	28.5%
Washington	37.3%	21.6%
Utah	35.1%	19.1%
Oregon	29.8%	16.3%
Western Canada	28.3%	15.5%
Wyoming	26.8%	11.9%
Idaho	21.8%	10.5%
Montana	20.9%	9.8%
South Dakota	20.9%	7.9%

In addition to familiarity and past visitation, respondents were also asked to rate the states. The question was: "How would you rate the state as a place for a leisure trip?" The responses were very good, good, fair, and poor. These are represented in the following table as a mean score, where very good equals 4, good equals 3, fair equals 2, and poor equals 1. The higher the rating, the more positive the response.

Interestingly, state imagery and past visitation differs. Colorado gets the highest rating, followed by California. But Arizona is rated in fifth place. Western Canada and Washington get high ratings, although they earned lower levels of visitation. Montana's rating is about average and is ranked eighth among the twelve states. Nevertheless, given that Montana was ranked 11th in visitation, Montana's image is stronger than its current market share. In other words, people were more positive about the state than is indicated by levels of past visitation.

	Rating Mean	Index
Colorado	3.50	114
California	3.47	113
Western Canada	3.33	109
Washington	3.22	105
Arizona	3.17	103
New Mexico	3.06	100
Oregon	3.05	100
Montana	2.98	97
Utah	2.91	95
Wyoming	2.90	95
Idaho	2.63	86
South Dakota	2.55	83

The most interesting findings surfaced when respondents were asked their likelihood to consider these states as future destinations. Responses suggest that future behavior may differ. The states that inspired the greatest future interest were Colorado, Washington, and Arizona. California ranked seventh among the twelve states. Though Montana's ranking was relatively low, its interest level was similar to that of several other states. There was very little interest in visiting Idaho or South Dakota. Of course, the fact that people say they intend to visit a location does not mean that they will. These ratings are based on the state's current imagery and interest in visiting new destinations.

	Likely Visit	Index
Colorado	39.3%	142
Washington	36.5%	132
Arizona	35.5%	129
New Mexico	31.1%	113
Oregon	30.0%	109
Western Canada	29.0%	105
California	27.6%	100
Utah	26.0%	94
Wyoming	24.6%	89
Montana	23.8%	86
Idaho	14.4%	52
South Dakota	13.3%	48

These findings suggest that Montana has earned low levels of visitation and is competitively disadvantaged. The state ranks in the bottom tier, although signs are positive concerning its overall rating and likelihood to visit. Perhaps recent marketing efforts are building a better image for the state. This research should provide insight about how to continue this process and put the state in a better competitive position. To assist in this evaluation, a review of each state helps to identify future strategic options.

California

Familiarity	***94.2%***	***Rating***	***3.47***
Past Visitation	***73.6%***	***Likelihood to Visit***	***27.6%***

California earned the highest familiarity rating and the highest level of past visitation. Almost everyone indicated familiarity with the state and almost three-fourths have visited - half in the past five years. California is certainly the most popular state.

California has very distinct imagery and is considered the most urban. In many of the categories, California received the highest rating. People believe that California offers a mix of city and cultural attractions in addition to golf, family attractions, lakes, historic sites, and parks.

	Mean	Index
Golf	3.17	142
Shopping	3.66	140
Urban culture/city attractions	3.43	136
Museums and cultural	3.33	129
Festivals or fairs	3.20	124
Family activities and attractions	3.58	122
Gambling	2.02	122
Lakes, rivers, water	3.36	113
Historic sites or landscapes	3.23	110
State or National parks	3.47	108
Hiking or backpacking	3.34	99
Dramatic landscapes/Mountains	3.37	97
Camping	3.10	96
Snow skiing	2.51	94
Quaint small towns	2.64	89
Hunting or fishing	2.75	89
Wildlife viewing	2.69	87
Native American culture	2.40	86
Snowmobiling	2.18	84
Vast unspoiled landscape	2.75	82
Cowboy or Western experiences	2.21	81

Interestingly, while California got the second highest overall rating, respondents reported only average likelihood to visit – with slightly over a quarter, 27.6%, indicating being very likely to visit California on their next trip. In part, the state's positive rating comes from the fact that residents are included in the study, although the state does have a strong positive image. At the same time, its image is not of a beautiful outdoor destination, especially when compared to the other states being assessed.

Arizona

Familiarity	***78.3%***	***Rating***	***3.17***
Past Visitation	***55.5%***	***Likelihood to Visit***	***35.5%***

Arizona is a leader for familiarity and visitation. Most respondents claimed to know about the state and over half have visited. Interestingly, the state rated fifth as a vacation location. Yet, though the rating is not as high as that for other states, respondents reported a high likelihood to visit in the future. It may be that Arizona is considered more accessible than some other options, and therefore gets visitation although it doesn't get the highest ratings.

The state's image is interesting and unique. The state gets its highest rating for golf. In addition, Arizona gets high ratings for its Native American culture and the Cowboy or Western experiences. The state's image is very sophisticated and its strengths are gambling, shopping, museums, and historic sites. The state is not considered a place for active outdoor activities such as skiing, hunting, camping, and others.

	Mean	**Index**
Golf	3.00	134
Native American Culture	3.47	124
Cowboy or Western experiences	3.12	114
Gambling	1.88	113
Shopping	2.79	107
Historic sites or landscapes	3.12	106
Museums and cultural	2.69	104
Urban culture/city attractions	2.59	103
Vast unspoiled landscape	3.45	103
Family activities and attractions	2.98	101
State or National parks	3.24	101
Hiking or backpacking	3.33	99
Festivals or fairs	2.55	99
Dramatic landscapes/Mountains	3.42	98
Quaint small towns	2.91	98
Camping	3.13	97
Wildlife viewing	2.81	90
Lakes, rivers, water	2.62	88
Hunting or fishing	2.51	81
Snow skiing	1.58	59
Snowmobiling	1.50	57

Arizona is considered a "developed" destination with a Western flavor. In part, the state's image results from its major cities. Arizona, more than many of the other states, is considered a resort-type destination.

Colorado

Familiarity	***83.1%***	***Rating***	***3.50***
Past Visitation	***51.6%***	***Likelihood to Visit***	***39.3%***

Colorado confirms the fact that strong imagery does not immediately translate to high visitation. Colorado earned the highest rating – a 3.5 out of 4. In addition, the state received above average ratings in 20 of the 21 attributes. Colorado has a strong, positive image and its level of familiarity was second only to California. Visitation was strong, but weaker than that for either California or Arizona. At the same time, Colorado was most likely to be considered for future travel. In part Colorado's strength comes from high past visitation and interest in Dallas.

The state has many strengths, especially relative to natural, active attractions. However, the state is also viewed as a place that offers amenities characteristic of a more developed destination, including family and urban attractions. Perhaps considered a weakness was respondents' perceptions that Colorado is not a particularly "Western" destination.

	Mean	**Index**
Snow skiing	3.61	134
Snowmobiling	3.31	127
Shopping	2.97	114
Family activities and attractions	3.32	113
Urban culture/city attractions	2.83	113
Hunting or fishing	3.47	111
Hiking or backpacking	3.70	110
Dramatic landscapes/Mountains	3.78	109
Golf	2.43	109
Lakes, rivers, water	3.22	109
Camping	3.46	107
Gambling	1.78	107
State or National parks	3.43	107
Wildlife viewing	3.30	106
Museums and cultural	2.69	104
Festivals or fairs	2.67	104
Vast unspoiled landscape	3.48	103
Quaint small towns	3.06	103
Historic sites or landmarks	3.02	103
Cowboy or Western experiences	2.74	100
Native American culture	2.70	96

Despite Colorado's strong imagery, it was not strongly identified as a Western destination. It may be that Colorado has not differentiated itself sufficiently from other options. Perhaps people do not have a clear reason to pick Colorado over competitors, each of which may enjoy more positive perceptions in specific areas.

New Mexico

Familiarity	***68.6%***	***Rating***	***3.06***
Past Visitation	***44.5%***	***Likelihood to Visit***	***31.1%***

The top three states are clearly leaders and after these, familiarity and past usage drop off. Strong familiarity was recorded for New Mexico, with somewhat less than half the respondents reporting past visitation. Dallas residents report strong visitation to New Mexico, which increases its overall numbers. A significant number, almost a third were very likely to consider in the future.

New Mexico has a distinct image and is believed to offer the best sampling of Native American culture. Linked to this is the strongest rating for gambling. This state is viewed as "Western" although it also received strong ratings for its cities, museums, and historic sites. New Mexico is not viewed as a place that offers much in the way of active outdoor attractions such as water activities, hunting, or winter sports. Because of its specific image, the state did not earn a strong overall rating, ranking in the middle of the pack.

	Mean	Index
Native American culture	3.49	124
Gambling	1.89	114
Festivals or fairs	2.89	112
Museums and cultural	2.90	112
Cowboy or Western experiences	2.97	108
Quaint small towns	3.09	104
Shopping	2.69	103
Urban culture/city attractions	2.59	103
Historic sites or landscapes	3.02	103
Camping	3.20	99
Golf	2.18	97
Family activities and attractions	2.83	96
Vast unspoiled landscape	3.22	96
Hiking or backpacking	3.20	95
Dramatic landscapes/Mountains	3.29	95
State or National parks	2.95	92
Snow skiing	2.44	91
Wildlife viewing	2.76	89
Hunting or fishing	2.69	87
Snowmobiling	2.11	81
Lakes, rivers, water	2.31	78

The state's strength seems to be a function of its being viewed as the best option to experience Native American culture in combination with an urban environment. Not everyone will visit New Mexico, but those interested in Native American culture are likely to visit. On the other hand, New Mexico is not thought to offer an unspoiled outdoors for dynamic activities.

Washington

Familiarity	***73.9%***	***Rating***	***3.22***
Past Visitation	***37.3%***	***Likelihood to Visit***	***36.5%***

Washington gets a strong overall rating as a vacation destination and over a third of the respondents claimed they were likely to consider visiting the state. Yet, past visitation is not as strong as it is for several other states.

Washington is viewed as an urban destination and its perceived strengths are city attractions, shopping, museums, and family attractions. Yet, respondents believe that Washington balances its urban image with a place that offers some natural features. While the state may not be the place to go for skiing or camping, it offers lakes, rivers, hunting, and mountain landscapes. As with Colorado, Washington is not viewed as a strongly "Western" destination.

	Mean	**Index**
Urban culture/city attractions	2.93	117
Shopping	2.93	113
Lakes, rivers, water	3.28	110
Museums and cultural	2.84	110
Family activities and attractions	3.10	105
Hunting or fishing	3.26	105
Festivals or fairs	2.68	104
Dramatic landscapes/Mountains	3.50	101
Snowmobiling	2.62	101
Golf	2.24	100
Hiking or backpacking	3.35	100
Snow skiing	2.66	99
State or National parks	3.17	99
Quaint small towns	2.88	97
Historic sites or landscapes	2.85	97
Gambling	1.60	96
Wildlife viewing	2.97	96
Vast unspoiled landscape	3.20	95
Camping	3.02	93
Native American culture	2.53	90
Cowboy or Western experiences	2.00	73

Washington is appealing because it generally offers something for everyone. While it is not viewed as a good place to experience Western or Native American culture, it has strong city attractions and things for the family to enjoy, all in a beautiful landscape.

Utah

Familiarity	***63.7%***	***Rating***	***2.91***
Past Visitation	***35.1%***	***Likelihood to Visit***	***26.0%***

Utah falls in the middle of the group in terms of its familiarity and past visitation, with about a third of the respondents having been to the state. Yet, Utah's rating is quite low and only about a quarter of respondents say they are likely to consider visiting the state in the future. This suggests that Utah's popularity is waning.

Utah's ratings in the specific attribute areas reinforce its relatively weak image. The state gets high marks as a place for winter sports – skiing and snowmobiling. In addition, it is viewed as slightly above average for its historic sites and parks, and there is some perception that the state has beautiful scenery. Generally, however, the state is considered below average in most areas.

	Mean	Index
Snow skiing	3.15	117
Snowmobiling	2.76	106
Historic sites or landscapes	2.98	101
State or National parks	3.25	101
Vast unspoiled landscape	3.34	99
Dramatic landscapes/Mountains	3.44	99
Wildlife viewing	3.07	99
Museums and cultural	2.51	97
Quaint small towns	2.86	97
Family activities and attractions	2.84	97
Camping	3.09	96
Cowboy or Western experiences	2.62	95
Lakes, rivers, water	2.83	95
Urban culture/city attractions	2.39	95
Hiking or backpacking	3.18	95
Hunting or fishing	2.91	94
Native American culture	2.63	94
Golf	2.04	91
Festivals or fairs	2.26	88
Shopping	2.25	86
Gambling	1.43	86

Currently Utah's image is likely to attract only those visitors looking for a place to enjoy winter sports. For other types of activities, people are likely to choose another state.

Oregon

Familiarity	***58.8%***	***Rating***	***3.05***
Past Visitation	***29.8%***	***Likelihood to Visit***	***30.0%***

Oregon also fell in the middle of the pack, although it seems to be gaining popularity. While past visitation is lower than other states, the overall rating is strong and more people indicated interest in visiting than have visited in the past.

Oregon is viewed as a place rich in natural outdoor activities. In the outdoor-related attributes such as lakes and rivers, wildlife viewing, camping, fishing, or backpacking, Oregon won high marks. People also believed that the state offers beautiful scenery and mountains. However, the state does not have a strong image as a place to enjoy Western or Native American culture.

	Mean	Index
Lakes, rivers, water	3.37	114
Wildlife viewing	3.31	106
Camping	3.43	106
Festivals or fairs	2.72	106
Hunting or fishing	3.27	105
Hiking or backpacking	3.50	104
Vast unspoiled landscape	3.50	104
Shopping	2.68	103
Dramatic landscapes/Mountains	3.55	102
Urban culture/city attractions	2.56	102
Historic sites or landscapes	2.98	101
Family activities and attractions	2.95	100
Quaint small towns	2.96	100
Snow skiing	2.67	100
Museums and cultural	2.56	99
Snowmobiling	2.55	98
State or National parks	3.11	97
Native American culture	2.60	93
Golf	2.07	93
Cowboy or Western experiences	2.40	87
Gambling	1.37	83

People who want to get away from cities and enjoy the beauty of nature are likely to consider Oregon as a major option, while those looking for Western or Native American culture may look elsewhere. The state is likely to gain popularity and visitation.

Western Canada

Familiarity	***63.0%***	***Rating***	***3.33***
Past Visitation	***28.3%***	***Likelihood to Visit***	***29.0%***

Western Canada earned high familiarity and strong imagery, but lower levels of past visitation. There is interest in visiting Western Canada, with slightly more people indicating interest than have visited in the past. These findings may indicate that more people are going to visit Western Canada or it may mean that accessibility issues are barriers to travel.

The image for this area includes the perception that it offers strong natural amenities with city attractions and beautiful scenery. This destination is one of the few that people consider having all three. It is not viewed as a place that has Western or Native American culture and there is a perceived lack of historic sites and landmarks.

	Mean	Index
Snowmobiling	3.05	117
Snow skiing	3.10	116
Lakes, rivers, water	3.33	112
Urban culture/city attractions	2.82	112
Wildlife viewing	3.40	109
Shopping	2.77	106
Hunting or fishing	3.29	106
Hiking or backpacking	3.54	105
Dramatic landscapes/Mountains	3.60	104
Quaint small towns	3.05	103
Museums and cultural	2.66	103
Family activities and attractions	3.00	102
Vast unspoiled landscape	3.38	101
State or National parks	3.12	97
Festivals or fairs	2.49	97
Golf	2.15	96
Camping	3.10	96
Native American culture	2.54	90
Historic sites or landscapes	2.66	90
Gambling	1.49	90
Cowboy or Western experiences	2.18	79

The appeal of Western Canada, like Colorado, seems to be the balance between natural and urban activities. It will have to compete with other destinations, many of which may be more accessible. This is probably what hampers the area's popularity and visitation levels.

Wyoming

Familiarity	***59.2%***	***Rating***	***2.90***
Past Visitation	***26.8%***	***Likelihood to Visit***	***24.6%***

While there is strong familiarity with Wyoming, only about a quarter have visited the state. Its rating is also fairly low, which indicates that the state is appealing to a smaller group of people. In addition, only about a quarter of the people indicated being likely to consider Wyoming for a future trip.

Wyoming is definitely viewed as a wild and rugged place that offers outdoor activities and dramatic scenery. This state is also most closely associated with the Cowboy or Western experience. Wyoming is definitely the place to get away from civilization to hunt, fish, view wildlife, camp, hike, or visit parks. On the other hand, Wyoming is not viewed as a place that has any urban or city attractions.

	Mean	Index
Cowboy or Western experiences	3.67	134
Hunting or fishing	3.58	115
Wildlife viewing	3.57	115
Snowmobiling	2.87	110
Vast unspoiled landscape	3.70	110
Camping	3.54	109
State or National parks	3.39	106
Hiking or backpacking	3.55	106
Dramatic landscapes/Mountains	3.65	105
Native American culture	2.87	102
Quaint small towns	3.02	102
Historic sites or landscapes	2.92	99
Snow skiing	2.65	99
Lakes, rivers, water	2.77	93
Family activities and attractions	2.69	91
Festivals or fairs	2.32	90
Gambling	1.33	80
Shopping	2.03	78
Museums and cultural	2.02	78
Urban culture/city attractions	1.92	76
Golf	1.70	76

The challenge for Wyoming is that its image is very definite and seems to appeal to a smaller segment of the population. For those who want the rugged outdoors, Wyoming is a good option, but potential travelers believe there is little in the way of sophistication or culture.

Idaho

Familiarity	***45.1%***	***Rating***	***2.63***
Past Visitation	***21.8%***	***Likelihood to Visit***	***14.4%***

Idaho is one of the least popular states. Fewer than half of respondents were familiar with the state and about 20% had visited. Idaho earned a low rating as a vacation destination and there was little interest in future visitation.

Idaho won some high ratings for natural activities such as skiing, snowmobiling, and hunting. People believed it has good natural amenities. However, the state was given lower ratings for its scenery, which makes it less appealing than other states. It is not viewed as a state that offers any city activities. It also does not have the "Western" cache that a place like Wyoming offers.

	Mean	**Index**
Snow skiing	2.94	110
Snowmobiling	2.80	107
Hunting or fishing	3.29	106
Lakes, rivers, water	3.04	102
Camping	3.29	102
Quaint small towns	2.98	101
Vast unspoiled landscape	3.34	99
Cowboy or Western experiences	2.72	99
Wildlife viewing	3.08	99
Dramatic landscapes/Mountains	3.33	96
Hiking or backpacking	3.21	96
Festivals or fairs	2.44	95
Gambling	1.53	92
Golf	2.05	91
State or National parks	2.92	91
Historic sites or landscapes	2.61	89
Family activities and attractions	2.59	88
Native American culture	2.47	88
Shopping	2.26	87
Museums and cultural	2.14	83
Urban culture/city attractions	1.98	79

Idaho has not been able to convince people that it has anything special or unique to offer. People believe it is a good place for outdoor activities, but it is not viewed as strongly as other places. It will be difficult for Idaho to attract visitation unless it can improve its image and give people a reason to visit.

South Dakota

Familiarity	***52.0%***	***Rating***	***2.55***
Past Visitation	***20.9%***	***Likelihood to Visit***	***13.3%***

South Dakota faces the greatest challenges. While there was some familiarity with the state, it received the lowest past visitation, the lowest rating, and the least interest in future visitation.

The problem is that the state received low ratings in most areas. It is viewed as the place for gambling and enjoying Native American and Western culture, though people do not think it offers opportunities for outdoor or urban activities. South Dakota earns high ratings for historic sites, probably related to Mt. Rushmore.

	Mean	**Index**
Gambling	1.95	117
Native American culture	3.05	109
Cowboy or Western experiences	2.90	106
Historic sites or landscapes	3.08	105
Vast unspoiled landscape	3.36	100
State or National parks	3.18	99
Quaint small towns	2.89	97
Snowmobiling	2.45	94
Camping	3.02	93
Wildlife viewing	2.90	93
Hunting or fishing	2.88	93
Dramatic landscapes/Mountains	3.22	93
Museums and cultural	2.37	92
Family activities and attractions	2.65	90
Festivals or fairs	2.24	87
Hiking or backpacking	2.86	85
Lakes, rivers, water	2.46	83
Golf	1.86	83
Urban culture/city attractions	1.99	79
Shopping	2.04	78
Snow skiing	2.04	76

At this point, it is unlikely that interest in South Dakota will grow. The state will need to change its image significantly before it will appeal to potential visitors.

Montana

Familiarity	***57.1%***	***Rating***	***2.98***
Past Visitation	***20.9%***	***Likelihood to Visit***	***23.8%***

The stage is set to evaluate Montana and its image among potential visitors. To date, Montana has not been a major player relative to visitation. The levels of familiarity and past visitation were among the lowest. The good news is that the state earned a better rating than several of its competitors did and there was relatively strong interest in future visitation.

Montana's detailed image suggests that the state offers the rugged outdoors and is a place to enjoy the Cowboy or Western experience. Perceived strengths include snowmobiling, wildlife viewing, hunting, fishing, camping, and skiing. People also believe that Montana has vast, unspoiled landscapes. In fact, Montana's image is very similar to that of Wyoming.

The areas where Montana received low ratings include shopping, urban attractions, golf, museums, family activities, festivals/fairs, and historic sites. These weaknesses limit the state's appeal and are barriers to consideration for many potential travelers.

	Mean	Index
Cowboy or Western experiences	3.40	124
Snowmobiling	3.02	116
Wildlife viewing	3.45	111
Hunting or fishing	3.40	109
Vast unspoiled landscape	3.65	108
Quaint small towns	3.19	108
Camping	3.45	107
Snow skiing	2.84	106
Hiking or backpacking	3.55	106
Native American culture	2.93	104
State or National parks	3.28	102
Dramatic landscapes/Mountains	3.55	102
Lakes, rivers, water	3.02	102
Gambling	1.66	100
Historic sites or landscapes	2.83	96
Family activities and attractions	2.79	95
Festivals or fairs	2.39	93
Museums and cultural	2.35	91
Golf	1.99	89
Urban culture/city attractions	2.13	85
Shopping	2.19	84

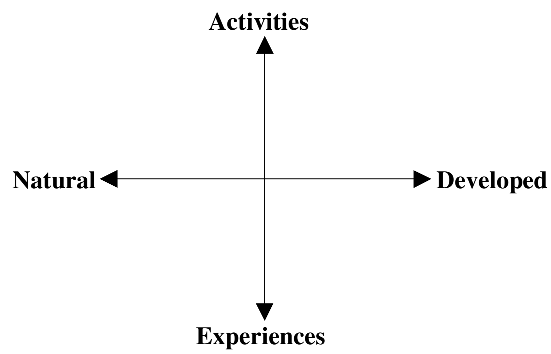
A review of Montana's ratings for each factor further highlights its perceived strengths and weaknesses. Montana is viewed most strongly as a Natural Passive, or Experiential, destination, although it received high ratings for being Natural Active. The key area of weakness is the Active Developed features.

	Mean	Index
Natural Activities		
Dramatic landscapes or mountains.	3.55	102
Camping	3.45	107
Hiking or backpacking	3.55	106
Hunting or fishing	3.40	109
Lakes, rivers, and water related activities	3.02	102
Snow skiing	2.84	106
State or National parks	3.28	102
Wildlife viewing	3.45	111
Snowmobiling	3.02	116
Average	3.29	107
Natural Experiences		
Vast unspoiled landscape	3.65	108
Cowboy or Western experiences	3.40	124
Quaint small towns	3.19	108
Average	3.41	113
Developed Activities		
Family activities and attractions	2.79	95
Festivals or fairs	2.39	93
Golf	1.99	89
Museums and cultural activities	2.35	91
Shopping	2.19	84
Urban culture or city attractions	2.13	85
Average	2.31	90
Developed Experiences		
Gambling	1.66	100
Native American Culture	2.93	104
Historic sites or landscapes	2.83	96
Average	2.47	100

The Competitive Environment

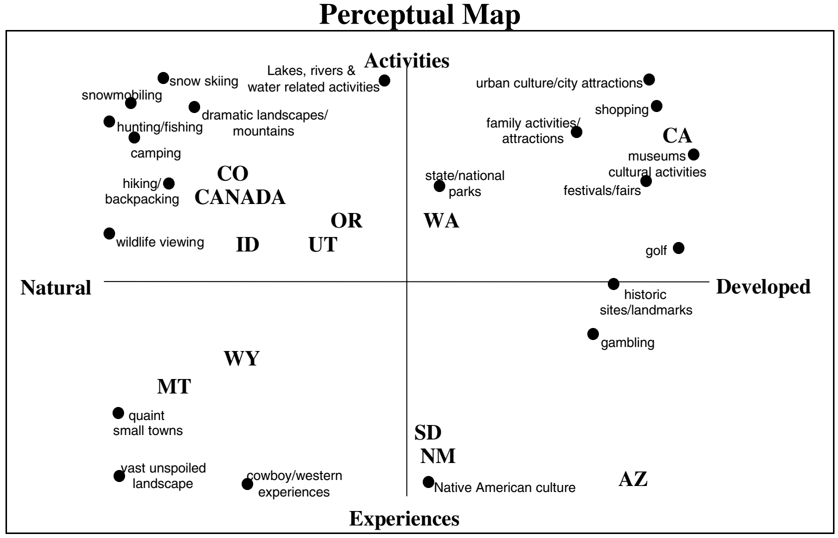
While a state by state evaluation is interesting and highlights the strengths and weaknesses of each one, this process fails to provide a clear picture of the competitive environment. Of interest is the manner in which the states are positioned in relationship to one another and what image Montana has in a comparative context.

The perceptual mapping technique can also be used to review the relative position of each state. As shown, the map differentiates between activities and experiences and natural and developed attractions.



In this context, it is possible to see where each state is positioned on the map. This "position" was statistically calculated based on the ratings of each state and comparisons of those ratings. Most of the positioning is not surprising, although each state's positioning provides insight into the perceived differences.

Perceptual Map



Natural Activity states – many destinations are located in this quadrant including Colorado, Western Canada, Oregon, Utah, and Idaho. Each destination has a strong image in at least one or two of the participatory sports such as skiing or snowmobiling. People feel they can participate in the rugged outdoors in these states.

Developed Activity states – this category includes California and Washington. These two states have the most urban, sophisticated and yet active image.

Developed Experience states – the states in this quadrant - Arizona, New Mexico, and South Dakota - are linked most closely to the Native American culture. This attribute "pulls" these states into this quadrant and helps to differentiate them.

Natural Experience states – the final quadrant includes Wyoming and Montana. These states have an outdoor image, but it is more significantly linked to a Western experience and beautiful scenery rather than participatory sports.

Currently, Montana is viewed as most directly like Wyoming. These two states are linked and have similar images. Unfortunately, this image is not the most appealing to potential visitors. This map presents challenges. If the state emphasizes its other strengths, such as participatory sports, it has to compete with several more established destinations. The question is, what position should Montana occupy and what message will create the desired image? The perceptual mapping software allows simulations that indicate how changing the state's image for various attributes would increase its appeal. This process provides insight into options for repositioning the state. This information, in conjunction with decisions regarding targeting, can help identify the best options for positioning and message development.

Changing the State's Image

The forgoing review provides a strong picture of the state's current image and position. It also provides insight into travelers, their preferences, and their perceptions of various destinations. Though interesting, this information is simply base data for developing a strategy. This strategy will include identifying appropriate targets and then crafting the most meaningful message to motivate travel. Changing the state's image will involve altering specific images about Montana. The perceptual mapping software provides an option for looking at the relative value of improving the state's image in various areas. The simulation exercise indicates the positive benefit of improving each attribute.

Improving the state's image in several areas will increase respondents' interest in visiting Montana. These include golf, urban culture and city attractions, festivals/fairs, and museums. In fact, all the activities that will have the most significant positive impact are "developed activities."

Interestingly, improving the state's image in some areas such as vast unspoiled landscapes, hunting, hiking, or camping has little positive impact because Montana has a strong image in these areas. As such, this will not differentiate Montana from the competition.

This analysis suggests that Montana can differentiate itself from the other states by focusing on more *developed* activities. One way to differentiate Montana is by moving it diagonally across the map to have an image more like Washington and California. The challenge is developing an image that offers the rugged outdoors, while promising a degree of culture or sophistication. The best option is probably not to go head to head with California or Washington, but to create an image a bit different from the other rugged outdoor places. The Western culture should be an underlying message, as this differentiates Montana from other places like Colorado.

Of course, it will be better to focus on attributes where Montana can offer a strong product and feature appealing options. For example, the *golf message* will be motivating if Montana can deliver on the promise. This is also true with the urban activities – Montana needs to carefully focus on areas where the product supports the message.

In determining the right message, Montana must finally decide the appropriate targets. Therefore, before finalizing the message, it is important to consider the traveler segments and targeting options.

Targeting the Segments

Having considered how people evaluate destinations and how they perceive the various states, Montana can turn to more strategic considerations regarding who to target and what message to promote. A number of factors should be considered in determining which segments to target. First, size is a consideration and a larger segment is usually better. Nevertheless, it is also important to target groups that are likely to visit the state or already have a positive attitude toward Montana. Before considering size, a review of these findings is helpful.

Respondents were asked both to rate the state as a place for a vacation and to indicate their likelihood to visit. Most interesting is the fact that the state ratings and the likelihood to visit ratings do not "match." For example, Active Families give the state a high rating but their ratings for likelihood to visit are below average. Moreover, both Active Empty Nesters and Urban Cowboys say they are likely to visit, although their ratings are only average. In part, this is because the ratings that each group gives Montana are similar. Because the ratings are very similar, and because the goal is to influence future visitation, likelihood to visit is the better measure.

At this point, Active Empty Nesters are the largest group and indicating the greatest likelihood to visit Montana. This group certainly seems a good target. On the other hand, Active Families, which is the second largest group, is the least likely to visit, although they give the state high ratings. This group might be worth targeting if the appropriate message can be identified. Together, they represent over half the population and would provide a sizeable audience for Montana. The key is whether the appropriate message will be believable for Montana and can differentiate the state as a vacation option.

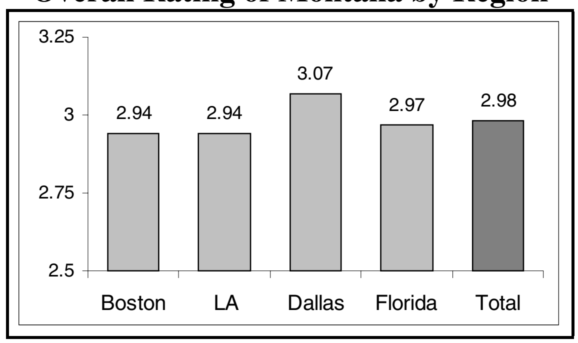
	Size	Likely to Visit Montana		Rating of Montana	
Active Empty Nesters	26.6%	15.3	116	2.31	99
Urban Cowboys	12.9%	14.9	113	2.30	99
Natural Families	13.3%	13.9	105	2.43	104
Economy Seekers	6.9%	12.8	97	2.28	98
Sightseers	15.5%	11.5	87	2.22	95
Active Families	24.9%	11.0	83	2.39	103

The more active message including golf, family activities, historic sites, and other more developed and active attributes will appeal to Active Empty Nesters and Active Families. If the goal is to focus on Urban Cowboys, the message should be more sophisticated. It is likely that Natural Families are already being attracted by the current message and focusing on a new image will not generate additional visitation from this group. The other two groups - Sightseers and Economy Seekers - are less appealing targets and do not warrant additional focus.

Market Differences

As part of this research, four geographic markets were considered – Boston, Los Angeles, Dallas, and Southern Florida. Differences in these markets might indicate that it is better to target one area over another. Interestingly, the overall ratings for Montana are almost identical in each geographic market. In fact, none of the differences is statistically significant.

Overall Rating of Montana by Region



There are few differences when the features and factors are considered. Respondents from Southern Florida were less positive but, again, the differences were not significant. Boston respondents gave Montana the highest ratings in areas like camping, hunting, skiing, wildlife viewing, and snowmobiling. People in Los Angeles see Montana as a place for skiing and dramatic landscapes, while those in Dallas focus on hiking, water activities, and national parks.

Natural Activities

	Boston	LA	Dallas	Florida	Total
Camping	3.71	3.35	3.43	3.26	3.45
Dramatic landscapes/Mountains	3.54	3.67	3.57	3.41	3.55
Hiking or backpacking	3.53	3.55	3.64	3.45	3.55
Hunting or fishing	3.55	3.41	3.45	3.18	3.40
Lakes, rivers, water	3.07	3.01	3.14	2.85	3.02
Snow skiing	2.91	2.91	2.73	2.83	2.84
State or National parks	3.20	3.29	3.39	3.27	3.28
Wildlife viewing	3.56	3.42	3.52	3.28	3.45
Snowmobiling	3.24	2.89	3.01	2.92	3.02
Average	**3.37**	**3.28**	**3.32**	**3.16**	**3.29**
Index to Overall Average	**102**	**100**	**101**	**96**	

In the Natural Experiences area, Boston residents were the most positive about Montana, giving it the highest ratings in most areas. Yet, residents in the other areas were also generally positive about what the state has to offer in this area.

Natural Experiences

	Boston	LA	Dallas	Florida	Total
Cowboy or Western experiences	3.54	3.43	3.37	3.26	3.40
Quaint small towns	3.22	3.26	3.19	3.08	3.19
Vast unspoiled landscape	3.73	3.69	3.70	3.44	3.65
Average	**3.50**	**3.46**	**3.42**	**3.26**	**3.41**
Index to Overall Average	**103**	**101**	**100**	**95**	

Interestingly, people in Dallas view Montana as being more developed and active. They give the state the highest ratings for things like family activities, museums, and shopping. People in Los Angeles and Florida were less positive about Montana in this area.

Developed Activities

	Boston	LA	Dallas	Florida	Total
Family activities and attractions	2.80	2.72	2.94	2.67	2.79
Festivals or fairs	2.56	2.29	2.43	2.28	2.39
Museums and cultural	2.34	2.37	2.47	2.18	2.35
Shopping	2.20	2.04	2.30	2.23	2.19
Urban culture/city attractions	2.03	2.19	2.14	2.18	2.13
Average	**2.38**	**2.32**	**2.46**	**2.31**	**2.37**
Index to Overall Average	**101**	**98**	**104**	**97**	

The final group of features includes the Developed Experiences. Dallas residents were most positive overall regarding these activities.

Developed Experiences

	Boston	LA	Dallas	Florida	Total
Gambling	1.68	1.49	1.73	1.74	1.66
Historic sites or landscapes	2.73	2.93	2.92	2.74	2.83
Native American culture	3.06	2.91	2.92	2.81	2.93
Average	**2.35**	**2.33**	**2.41**	**2.32**	**2.35**
Index to Overall Average	**100**	**99**	**102**	**99**	

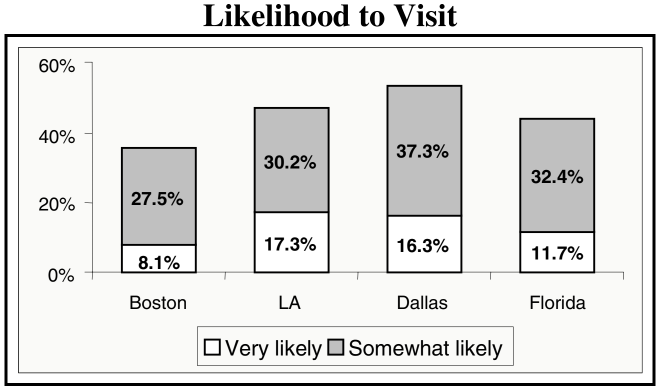
Visitation patterns vary by region, as might be expected. Proximity plays a role in destination selection and, in many cases, people in a specific market are more likely to have visited states that are nearby. Consequently, people in Dallas and Los Angeles are much more likely to have visited most of these states.

% Visited in Past Five Years

	Boston	LA	Dallas	Florida
Montana	6.0	11.5	13.0	8.5
Arizona	21.0	67.0	43.0	26.5
California	33.5	94.5	47.0	36.5
Colorado	23.5	28.5	53.5	23.5
Idaho	7.0	14.5	12.0	8.5
New Mexico	12.5	30.5	58.0	13.0
Oregon	9.0	33.0	14.5	8.5
South Dakota	4.5	8.5	11.0	7.5
Utah	12.0	31.5	17.5	15.5
Washington	15.0	33.0	20.0	18.5
Wyoming	6.5	11.5	19.0	10.5
Western Canada	14.0	22.0	13.0	13.0

Given that the differences between the four markets are quite small, there seems little reason to target one area above the others. Yet, as noted, attitudes and behavior are not always directly linked. The differences in respondents' responses when they were asked about their likelihood to visit Montana are worth noting.

Likelihood to Visit



The more traditional markets, Los Angeles and Dallas, are more likely to consider Montana for future trips. Interestingly, while Floridians rate Montana lower than the other areas, they are more likely to consider a visit than are Bostonians. This may relate to perceived cost or access issues. At the same time, these differences are again not huge. It seems that both Boston and Florida represent good targets for Montana. Dallas seems like the best target and perhaps the most developed market to date.

Final Recap

Montana faces a challenging competitive situation and to successfully compete, the state needs a well thought out and executed strategy. While there is some awareness of the state in the four markets under consideration, a compelling and unique image has yet to be created. Past levels of visitation to the state are low and future interest remains low compared to that of many competitors. Nonetheless, this research paints a clearer picture of the state's image, travelers' preferences, segments to target, and the best way to increase visitation interest.

The first step is gaining an understanding of potential visitors and the manner in which they evaluate destinations. When selecting a travel destination, people look for specific types of trips and then choose the destination they believe will deliver what they are looking for. Generally, people choose between places where they can do things (activities) or experience things. Additionally they differentiate between natural or God-made attractions and developed or man-made attractions.

While it is fairly easy to determine if something is natural or man-made the difference between activities and experiences is not as clear. This is especially true regarding the Western or Native American culture, which is a key feature of Montana and its competitors. This research indicates that the culture of these areas implies an experience rather than an activity, with the Western culture being more natural and the Native American culture being more developed. While this classification of Native American culture seems counter-intuitive, this image seems to come from a strong link between Native American culture and gambling. This research leaves questions as to how respondents view Western and Native American experiences, and is probably an issue that should be explored further.

Currently, Montana is viewed as a more Natural Experience. The state's image is definitely influenced by the images of the other states. Since consumers generally have stronger images and more awareness of some of the other states, Montana is compared to them. As such, although Montana offers lots of rugged, outdoor activities, it is not considered as strong in this area as states like Colorado and Oregon. At the same time, both Montana and Wyoming have the image of the quintessential Western destination.

At this point, Montana is viewed as most similar to Wyoming. Currently, Montana recognizes this synergy and works with Wyoming as a natural ally. This has worked well, especially in promoting features such as Yellowstone National Park. This strategy should continue to work to attract the state's traditional audience. To broaden its audience and attract additional visitors, Montana may want to differentiate itself and create a somewhat different image. A review of Montana's current image and that of its competition suggests that the state should market its *more developed attractions* such as golf, urban attractions, festivals, and museums. The key will be identifying the areas that Montana can promote where the product supports the marketing message. Generally, Montana needs to still promote itself as a place that offers outdoor activities, but one that has a strong Western culture and a bit of sophistication as well.

Of course, the final message also depends on the people the state targets as potential visitors. This study identified six traveler segments: Active Empty Nesters (26%), Active Families (25%), Sightseers (16%), Natural Families (13%), Urban Cowboys (13%), and Economy Seekers (7%). The best option for Montana seems to be Active Empty Nesters, which is the largest group and the one that shows interest in Montana. The key activities for this group include golf, museums, small towns, and historic sites. Active Families and Urban Cowboys might also be worth targeting. With all three groups, an active message will be most appealing.

Targeting a slightly different message to each group is the best option. For example, both Active Empty Nesters and Urban Cowboys will react positively to golf promotions, but the spin on the message should be slightly different. With Active Empty Nesters, golf should be packaged with some culture and history, while for Urban Cowboys, the message should focus on luxury and the availability of other active outdoor opportunities. With Active Families, the message should include strong doses of family activities and the message that there is lots to do in Montana.

At the same time, Montana should maintain its image as a place with strong Western culture. The marketing should probably focus on new and unexpected activities, while showing expected images and scenery. The state should try to convince people that there is more than empty space, since this sends the message that there is little to do or enjoy in the state.

Whatever message is chosen, it is possible to promote this message in all four geographic areas under consideration. The differences in attitudes between the markets were *insignificant*. The closer markets may visit sooner but the eastern markets promise strong potential for Montana.

Appendix